

SHORE

the Massachusetts HMIS

APRIL 2006

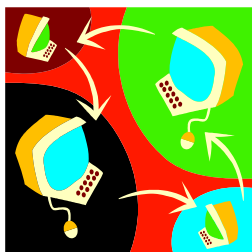
SHORE MEETING IN WORCESTER

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On behalf of the Balance of State Continuum of Care (BoS), the Department of Transitional Assistance (DTA) and the Interagency Task Force on Housing and Homelessness (IATF) hosted a Continuum of Care meeting on February 27, 2006 at the UMass Medical School Campus in Worcester. All Massachusetts Continua of Care were invited to participate.

Laura Spark and Kathryn McHugh, BoS Consultants for DTA, discussed the need for the Continua to work closely to maximize funds coming into the Commonwealth. They discussed strategies for Continuum of Care planning and preparing competitive SuperNoFA responses. Attendees were asked if the state should be more involved in responses and the response was that the Continua need assistance with matching funds. State agency representatives attended and

everyone agreed to collaborate and brainstorm on ideas for matching funds. CoC representatives were asked about the involvement of homeless and formerly homeless individuals in their organization. BoS representatives asked for suggestions to increase consumer involvement in its planning processes.

The Interagency Council on Housing and Homelessness Subcommittee on Chronic Homelessness Data Task Group is interested in how Massachusetts's homeless services agencies conduct point-in-time homeless census counts. Teri Anderson, co-chair of the Data Task Group conducted an informative presentation to the group. She volunteered the Data Task Group researchers and others to facilitate a discussion on the HUD Homeless Census in Massachusetts and offered to

compile the data and distribute a cross-continuum report. Members of the HMIS/SHORE deployment team also provided a statewide overview of the HMIS deployment and answered questions.

John Shirley, Director of Housing & Homeless Services at DTA, asked for feedback from CoC's on a variety of topics. He would like to have regular meetings with all Continua and asked for suggestions on how frequent meetings should be and what are the most useful agenda items for Continua. Attendees agreed that continuing to collaborate and increase efforts to keep each other informed are ways to maintain or increase the amount of federal money for homeless programming in Massachusetts. The BoS will take the lead on scheduling meeting and inviting state agency partners to attend.

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UPGRADE TO SHORE VERSION 5.2

We at DTA are continuing to develop the SHORE system based on User feedback. This month's enhancements center on the Bed Register.

We have developed a new feature which allows users to "Find Clients" once client ID's are entered into the Bed Register, returning identifying information attached to the client's ID to ensure the correct client has been selected. This feature will come in particularly handy when future development allows for bar coding or other quick check-in

tools.

The other major enhancement is that users no longer have to go into a client's record to complete the check-in process. When checking in clients, users will now see a link for *CheckIn* when the client information is displayed. Clicking this link will



check the client in and bring up the next client to be checked in.

The primary mechanism for User feedback is through one of the many subcommittees of the SHORE Steering Committee. These subcommittees meet regularly to discuss improvements to the SHORE system. If interested, contact Deb Connolly. Please sign up!

These enhancements were proposed by the Development/Enhancement subcommittee. We thank them for their effort.

PREPARING FOR THE NEXT MILESTONE: REPORTING!



additional steps you can take that may locate even more duplicates. For instance, you can download the client file into a spreadsheet so that it is easy to sort in a variety of ways. A sort by first name can sometimes show duplicates hiding behind phonetic variations of someone's last name. A sort by date of birth can pick up common inversion errors such as John James and James John. A sort by Social Security number can likewise pick up duplicates that might not otherwise be found.

Now that providers have a sufficient number of client records in the SHORE system, it is time to focus on reporting. Developing confidence in reporting the data is a process that requires several steps to ensure a high degree of accuracy. These steps include unduplication of records, data quality checks, and validation. We will examine each of these steps in successive newsletters. This time, we will focus on unduplicating data.

This is a process that is admittedly time-consuming but absolutely essential to accurate reporting. The SHORE system provides a "Potential Duplicates Report" to get you started. However, there are

The SHORE system makes it easy to "merge" the duplicated records so that vital information is not lost through a simple deletion of a duplicate entry. Instead, the information is combined so that a full record of services exists.

When duplicates are found, their client ID's should be noted. This way, you can quickly locate them when you click on the Merge Client link, located under the Client menu.

Once the first client is selected, you will automatically be prompted to locate the second client. It is important to select the proper

direction of the merge once both clients appear. In most cases, you would want to *merge to* the most complete record.

When you are sure of the proper direction, click Merge.

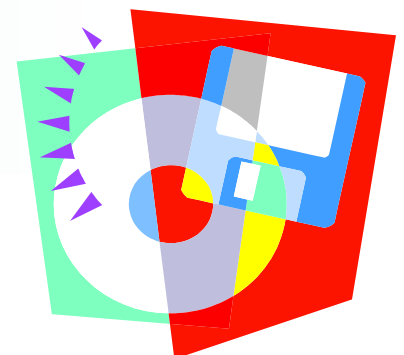
Repeat this process until all the records for a particular client have been merged, so that only one client record exists for the individual.

By now you will have noticed that the greatest number of duplicate records are attributable to spelling errors. One of the most common reasons for duplicates is that staff feel uncomfortable asking a client to spell their name if it seems easy to spell! Yet, even the most common names can be spelled in a variety of ways.

Asking someone to spell their name is not a reflection of a staff member's intelligence. It is a collective effort that requires asking the client to spell both their legal first name and last name in order to ensure the client does not already have a record in the system.

Now that your data is unduplicated, we will examine Data Quality in the next issue.

"It is important to select the proper direction of the merge once both clients appear. In most cases, you would want to *merge to* the most complete record."



TRAINING! TRAINING! TRAINING!

If you have attended training recently, you are aware of the fact that our training manual was in need of an update. That process has been completed, and our new Individual Program Training and Family Program Training manuals are now in Quality Assurance. We hope to have them ready for distribution via email sometime in April.

While we are on the subject of training, please remember that users are always welcome to attend SHORE User training or retraining. Please have your Agency's HMIS Administrator contact Gail Law to schedule training. We have training labs in Boston, Worcester, Taunton, and

Holyoke.

The priority for each class will be the Providers new to HMIS, but, as openings exist, we will fill in with as many others as possible on a first-come first-served basis.

SHORE staff is developing Reporting Training so that you can learn how to download and query your own data for reporting. While we will still continue to develop "canned" reports based on feedback, we cannot always give you all the information you need in precisely the way you need it. Downloads allow you to move your data into other programs so that you can "tweak" the



data exactly the way you need it.

We are also developing Administrator Training because future upgrades to the SHORE HMIS system will allow providers more

control over setting up and maintaining their sites.

If you have any training suggestions, please contact a SHORE staff member. We will keep you posted on future training related events through this newsletter.

SHORE QUESTIONS & ANSWERS

In each newsletter, we will include some of the most frequently asked questions about SHORE. If you have a question, please contact us.

Question: My organization has already signed up for the Virtual Gateway. Why do we have to fill out the same forms again to use the SHORE HMIS?

Answer: You do need to complete and submit some very similar forms, but they are not all exactly the same. The Virtual Gateway (VG) hosts many different "business services" administered by EOHHS agencies such as DTA. Each business service uses the Virtual Gateway symbols and formats in its welcome packages but, while documents may look very alike, they have some distinct and important differences. For example, some of the other business services that you may be aware of or that some staff in your organization may be using are Common Intake or Provider Data Management (PDM). Since each of these business services has its own unique purpose, each has unique agreements to be completed. However, once your organization has signed the **Virtual Gateway Services Agreement** it will be established as a VG organization and that particular agreement will not need to be resubmitted to join other business services in the future.

Question: So what do I have to complete and send to the VG if my organization already submitted a Virtual Gateway Services Agreement to use PDM or Common Intake?

Answer: The **Rider for the Homeless Information Management System** is specific to the use of the SHORE HMIS and is a required "rider," or addendum, to the VG Services Agreement mentioned above.

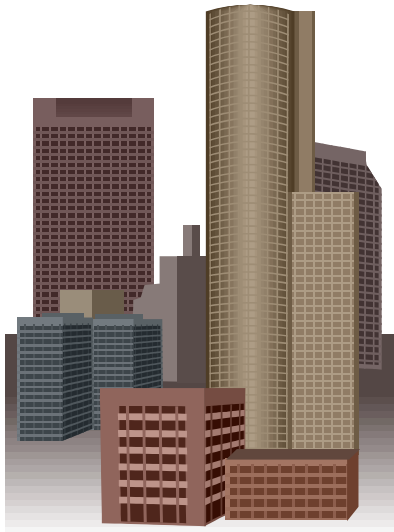
The **Designation of Access Administrator** form is required by all business services to establish a point person(s) for each organization for each business service. Organizations must consider the type of business service and assign the most appropriate staff to fill this role. One individual may be an Access Administrator for several business services (such as Chief Information Officer), or there may be several Access Administrators specific to a business service. It is up to each organization to choose what is best for its operation.

The **User Request Form** for VG Access establishes which level of security is assigned to staff in an organization. Staff can have access to more than one business service if it is appropriate to their work, but an organization must request such access to each business service by completing the User Request Form and selecting the most appropriate role(s) as described in the Roles Matrix.

Question: If I can't complete my data input today, can I backdate it at a future time?

Answer: While it is always preferable to enter each client as they present themselves to your location, the program entry dates and the bed registers can easily be backdated to the actual day of entry. However, please note that the date the record is added into the system cannot be altered.

HMIS STEERING COMMITTEE DATES & INFORMATION



Next meeting: Wednesday,
April 12, 2006
at 2:00 pm

Location: China Trade Building,
2 Boylston Street, Boston

Take the **Orange** Line to Chinatown or
the **Green** Line to Boylston Street

FOR MORE INFORMATION ON:

Legal Briefings & Training:

Gail Law

617-348-5631

Gail.Law@state.ma.us

Operations & Conversion:

Bill Silvestri

617-348-5161

William.Silvestri@state.ma.us

SHORE SPECIAL POINTS OF INTEREST:

- **There are 48 organizations, representing approximately 243 programs, trained to use SHORE**
- **In all, there are 235 organizations statewide that have been identified as potential SHORE users or uploaders**

CONTINUUM OF CARE/ESG CORNER

This issue of the CoC/ESG Corner will try to answer some of the questions we have received regarding HUD applications and Emergency Shelter Grants (ESG).

HUD CoC APPLICATIONS:

Discharge Policies

DTA is preparing a summary of the discharge policies required by HUD which we will distribute to all Continua in the next week or so.

HMIS

We are completing our HMIS information in advance to send out to all Continua.

In addition, we need to include a list of Continua covered through SHORE, our HMIS. We will include all Continua where each member has signed a legal agreement with DTA. To obtain a list of organizations within your Continuum, if any, which have not yet signed the DTA Agreement, please

contact Gail Law by phone at: (617) 348-5631 or by E-mail at: Gail.Law@state.ma.us. Those organizations will need to sign the DTA Agreement if your Continuum is to be included in our Application.

Please note that DSS agencies which primarily serve victims of domestic violence are currently exempt by HUD from the HMIS requirement.

Next Statewide CoC Meeting:

DTA expects to have its next Statewide Meeting of Continua in July 2006. We plan to invite guest speakers to update CoCs on a number of statewide initiatives that are underway and to solicit input on activities being undertaken by task groups within the Massachusetts Interagency Council on Housing and Homelessness. We would like to hear from each Continuum with

specific items that ought to be on the agenda. Please feel free to contact Elaine Frawley with suggestions, (617) 348-5936, or Elaine.Frawley@state.ma.us.

ESG

DTA ESG RFR

The DTA Emergency Shelter Grant Request for Responses is currently on Comm-PASS. The Respondent's Conference was held in Worcester on April 11. Responses are due to DTA by 4:00 p.m. on April 26, 2006.

ESG Fundamentals: A training for ESG Grantees

HUD has funded a full-day training for New England State and local ESG formula grantees to be presented by the Technical Assistance Collaborative, Inc. on April 27, 2006. The Technical Assistance Collaborative has planned a comprehensive

training that will review ESG program requirements, clarify roles and responsibilities, discuss management requirements, and provide guidance and helpful hints on how to administer the ESG program effectively.

HUD requested all registration forms by April 7. If you have questions about the training please contact Aggie Douglas of HUD at 617- 266-4343.